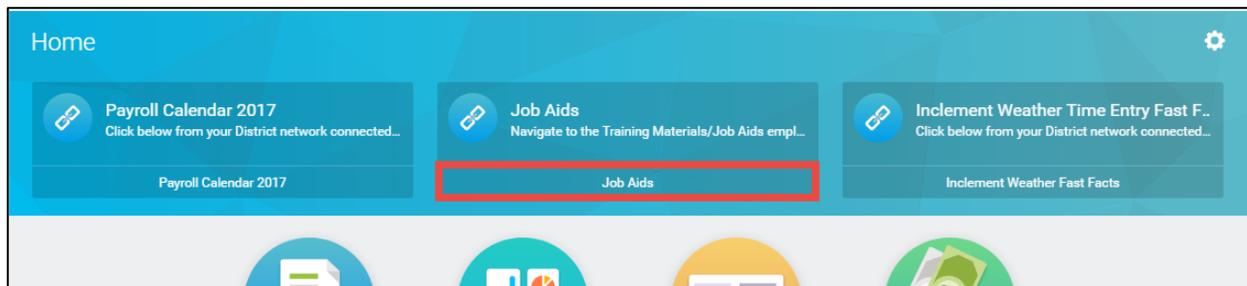


Procurement Helpful Hints

Helpful Hints: Use the following information to assist you with procuring goods or services for CMSD in Workday.

Learning Library: Access the training materials by clicking the Job Aids button from your Workday Home screen. (See Image below) Or use the following URL:

<http://www.clevelandmetroschools.org/Page/11869>



Procurement Job Aids:

- 01_Purchases Worklet
- 02_Create Requisition - Search Catalog
- 03_Create Requisition - Non-Catalog Items
- 04_Create Requisition - Supplier Website
- 05_My Requisitions Worklet
- 06_Execute Budget Status Report
- 07_Create Budget Amendment
- 08_Approve Requisition
- 09_Create Supplier Request
- 10_Create Supplier Change
- 11_Sourcing Requisitions
- 12_Create Purchase Order
- 13_My Recent Purchase Orders Worklet
- 14_Edit Purchase Order
- 15_Approve a Purchase Order-Change Order
- 16_Create Change Purchase Order
- 17_Create Supplier Contract
- 18_Approve a Supplier Contract-Contract Amendment
- 19_Amend Supplier Contract
- 20_Create Receipt
- 21_Create Return Order

Searching: When executing searches in Workday, it is not necessary to enter complete words, you only need to enter the first 3 letters of each word. (i.e. Fin Pur Ord vs. Find Purchase Orders)

Creating in WD: After creating anything in Workday (Requisition, POs, Contracts, Receipts, and etc.), be sure to check your **WD Inbox Archive** tab to confirm the Budget Check Passed. If it did not pass, you will receive a task in your **WD Inbox**.

Helpdesk: Phone Number: **(216) 838-0440** (Select **Option #2** for Workday Support)
For a limited time in July & August of 2017, functional experts will have "Office Hours" at 1111 Superior or EPC to provide one-on-one assistance to complete Workday tasks. (Additional communication will be sent out with details)